



FINANCIAL PLANNING

Association Of Singapore

Add: 146 Robinson Road, #04-02 Singapore 068909
Tel: (65) 6372 1030
Fax: (65) 6372 0121
Email: membershipfeedback@fpas.org.sg
Website: www.fpas.org.sg

Official Use
*Submission Via:
[] FFP
[] FPAS
Membership No.:
Date of Approval:

Course applied with: [] Financial Perspectives Pte Ltd
Course applied for: CFP® Certification Programme

Sections 1 to 4 are compulsory fields, please ensure completion to avoid delay in processing.

Section (1) : Personal Particulars:

Name (Surname, Given name), NRIC/Passport No, Date of Birth, Gender, Nationality, Residential Address, Mailing Address, Home Tel, Office Tel, HP, E-mail

Section (2) Occupational Particulars:

Company Name, Company Address, Job Title, *Employed / Self-Employed, Period (YYYY eg 1991), Industry (eg. insurance, banking), Department (eg. sales), Company

Section (3) Educational Particulars:

Highest qualification obtained, Academic institution attended, Other Professional Memberships

Section (4) Declaration Agreement (by applicant):

1. Have you ever been charged or convicted in a court of law... *Yes/No
2. Have you had a business related licence, registration or membership revoked, denied or suspended? *Yes/No
3. Are you an undischarged bankrupt or ever been declared bankrupt? *Yes/No
4. Have you ever been refused membership of a statutory professional or other body... *Yes/No
5. Have you ever been subject to disciplinary proceeding or expelled by a statutory body... *Yes/No
6. Have you ever been dismissed or had a proper authority or life insurance agency withdrawn... *Yes/No
7. Have you ever past or pending claims made against your professional indemnity insurance... *Yes/No

Note: If you have answered "Yes" to any of the above questions, please attach relevant documents which provide full details of the matters.

I hereby declare that all information is true to my best knowledge, and I understand FPAS reserves the right to verify information I have provided in this form. I hereby agree to abide by FPAS' Professional Standards and Code of Ethics. I am also acknowledging awareness that the program fee payable to the education provider excludes the examination registration fee, which must be paid separately to FPAS subject to FPAS' terms and conditions.

- 1. I hereby agree to pay the membership fee promptly.
2. I further understand and agree that FPAS has the absolute and unrestricted right to revoke the rights of my membership.
3. I agree to compensate FPAS in full on demand for:
(i) All claims made by third parties alleging losses or injury as a result of any wrongly or unauthorized use by me of the Certifications Marks; and
(ii) All other losses or expenses suffered by it as of that use unless and except to the extent that any loss, injury or expense arises solely as a result of any act or default on FPAS' part.

I affirm that I have read carefully and voluntarily agree to the terms of the Declaration Agreement.

Signature / Date

Payment Details (please complete)

EPayment, Reference No : EPaymentID, Transaction Date, Cheque Payment, Bank, Cheque Number, Date of Cheque, Fee Payable: [] Jan-Mar, [] Apr-Jun, [] Jul-Sep, [] Oct-Dec

Important note:-

- (1) If you are paying by EPayment, please fax to FPAS at Fax No: 6372 0121 this form a copy of the EPayment transaction reference receipt for processing.
(2) If you are paying by Cheque, please send to FPAS at 146 Robinson Road, #04-02, Singapore 068909, this form, and cheque payment (made payable to "FPAS") for processing.

PROCEDURES FOR FPAS' MEMBERSHIP AND EXAMINATION REGISTRATION

Membership Registration

- Members enrolling in the certification program **must** apply for FPAS' Membership.
- The current year's annual membership fee is pro-rated, based on your date of 1st application as per below table:

| Jan – March (1 st Qtr) | Apr – June (2 nd Qtr) | Jul – Sep (3 rd Qtr) | Oct – Dec (4 th Qtr) |
|-----------------------------------|----------------------------------|---------------------------------|---------------------------------|
| \$120.00 | \$90.00 | \$60.00 | \$30.00 |

Please note that subsequent renewal date will be on 31 December of each year and the full year annual membership fee applies.

- Members applying for the FPAS' membership must duly complete the FPAS' Membership Application Form includes payment. Incomplete form and /or nonpayment will not be processed.
- Members can make payment either by EPayment or Cheque.
 - If you are paying by EPayment, please fax to FPAS at Fax No: **6372 0121**, this form and a copy of the EPayment transaction reference receipt for processing.

| Steps to making EPayment | |
|--------------------------|--|
| Step 1: | Log on to http://www.fpas.org.sg |
| Step 2: | Click on the E-Payment icon |
| Step 3: | Select the Payment Type ie Membership Registration . |
| Step 4: | Complete all fields, select the Membership Type and confirm the Amount payable |
| Step 5: | Read the Declaration and Disclaimer before selecting the Submit button |
| Step 6: | Select payment via VISA or MASTERCARD |
| Step 7: | Enter your payment card details and select the Submit button |
| Step 8: | Print a reference copy of your transaction |

- If you are paying by Cheque, please send to FPAS at 146 Robinson Road, #04-02, Singapore 068909, this form, and cheque payment (made payable to "FPAS") for processing.

Examination Registration

- Members can register for examination(s) only if they have a valid FPAS membership and are currently enrolled in AFP^{CM}/AWP^{CM}/CFP[®] Education Program with a FPAS' approved Education Provider. Members will be notified by FPAS via email of the period for each examination registration.
- Members registering for the FPAS' examination must duly complete the prescribed examination registration form.
- The examination registration form and payment of examination fees must be made directly to FPAS and in compliance with all FPAS' terms and conditions.
- FPAS is solely responsible for all matters pertaining to applications for certification(s), exemption(s) and examination(s). Queries pertaining to exemptions, examinations and/or certifications should be directed to FPAS at Tel: 6372 1030 or via email to:

| | |
|----------------------------------|--|
| Feedback on Membership Services: | membershipfeedback@fpas.org.sg |
| Examinations Issues: | examination@fpas.org.sg |
| Other feedback: | fpas@fpas.org.sg |

Course fee paid to education providers does not include FPAS' Membership and Examination fees. All fees paid to FPAS are non-refundable.